

When there is not an internet connection available to enable you access our online LeadMaster database, you may wish to use Microsoft Outlook to keep notes on contacts. This brief tutorial is designed to explain the simple process of sharing information between the two applications.

Save a New Contact to Microsoft Outlook

 **Add Contact:** To save a LeadMaster contact to Microsoft Outlook for the first time, you can click on the Add Contact icon for that contact on a number of pages, including the main Profile (see Figure 1), Sales Update and Edit Profile screens.

To add a contact: To add a contact to Outlook, click the Add Contact icon next to any of the contacts listed on the Profile screen for the record. Clicking this icon will launch Outlook and display a new contact record (see Figure 2). To save to Outlook, click the Save and Close button. This same process can be followed by clicking on the icon for the contact you wish to save from the Sales Update or Edit Profile screens. If the contact already has been added to Outlook, it will alert you to the duplication (see Figure 3).



Profile Record Status: ACTIVE

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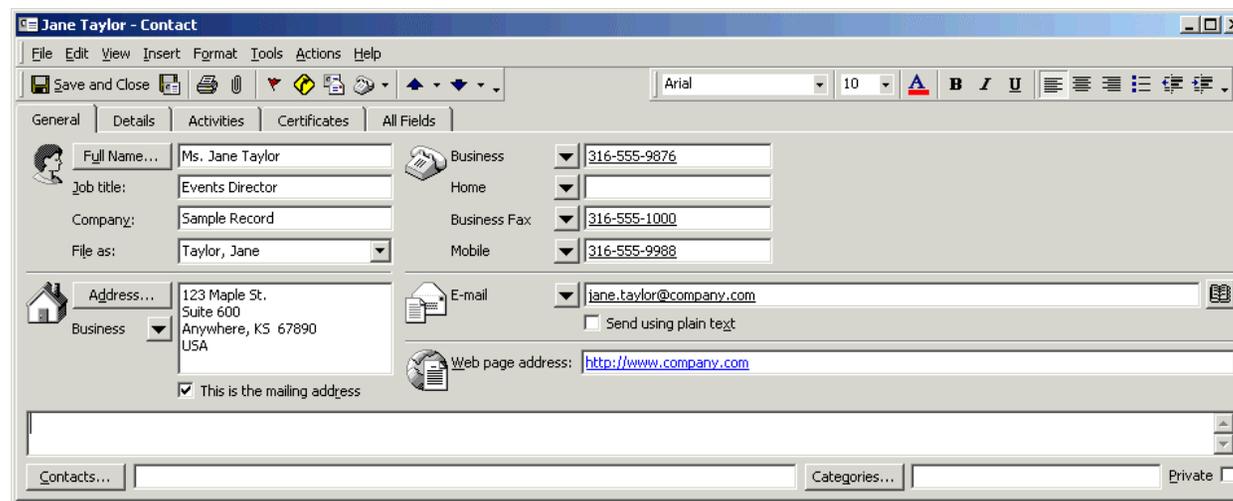
Contact Info

Name Ms. Jane Taylor 	Date Entered 4/11/2002
Title Events Director	Contacted Date None
Title Code High Level	Last Updated 5/15/2002 - S. AdminSD
Function Marketing	Phone 316-555-9876
	Alt Phone 800-555-2400
	Cell/Mobile 316-555-9988
	Fax 316-555-1000
Company Sample Record	Email jane.taylor@company.com
Address 1 123 Maple St.	Web Address www.company.com
Address 2 Suite 600	Company Revenue \$0
Address 3	# Emp. 0
City Anywhere	SIC Code 0
State KS	Company #
Zip 67890	Ultimate Duns
Country USA	Site Duns

Contacts 

Contact	Title	Phone	Email	vCard
Jane Taylor	Events Director	316-555-9876	jane.taylor@company.com	
Frank Jones	Marketing Director	316-555-1234	frank.jones@company.com	

Figure 1: Contact Section of Profile Screen with “Add Contact” Icons



Jane Taylor - Contact

File Edit View Insert Format Tools Actions Help

Save and Close           Arial 10              

General Details Activities Certificates All Fields

Full Name... Ms. Jane Taylor 

Job title: Events Director 

Company: Sample Record 

File as: Taylor, Jane 

Address... 123 Maple St. 

Business Suite 600 Send using plain text
Anywhere, KS 67890 

USA This is the mailing address

Contacts... Categories... Private

Figure 2: Microsoft Outlook New Contact Window

Update an Existing Outlook Contact with Data from LeadMaster

If you have already saved a contact to Outlook but have then changed contact details (such as phone number, address etc.) for that record in LeadMaster, you can update the Outlook contact record with this new information

To update an existing contact: In LeadMaster, click on the Add Contact icon for that person just as you would to add a new record to Outlook. In the Outlook new contact window, click the Save and Close button. This will prompt Outlook to alert you that this contact already exists in Outlook (see Figure 3). Select the “Update new information from this contact to the existing one” radio button and then click OK. Note that this will overwrite any information you have entered into the existing Outlook record that has not been updated into LeadMaster. If you want to view the existing record before saving the update, click on the Open Existing Contact window.



Figure 3: Microsoft Outlook Duplicate Contact Alert

Record Notes in Outlook and Update LeadMaster Record

If you do not have access to the Internet in order to update contact information directly in the LeadMaster system, you can save notes in the Outlook Contact record and then later copy these notes to LeadMaster.

To record updates in Outlook: During times when you do not have internet access, you can record updates in the existing contact record in Outlook In Outlook by opening the existing contact in Outlook, entering notes in the comments box (see Figure 4) and then clicking the Save and Close button or going to File>Save.

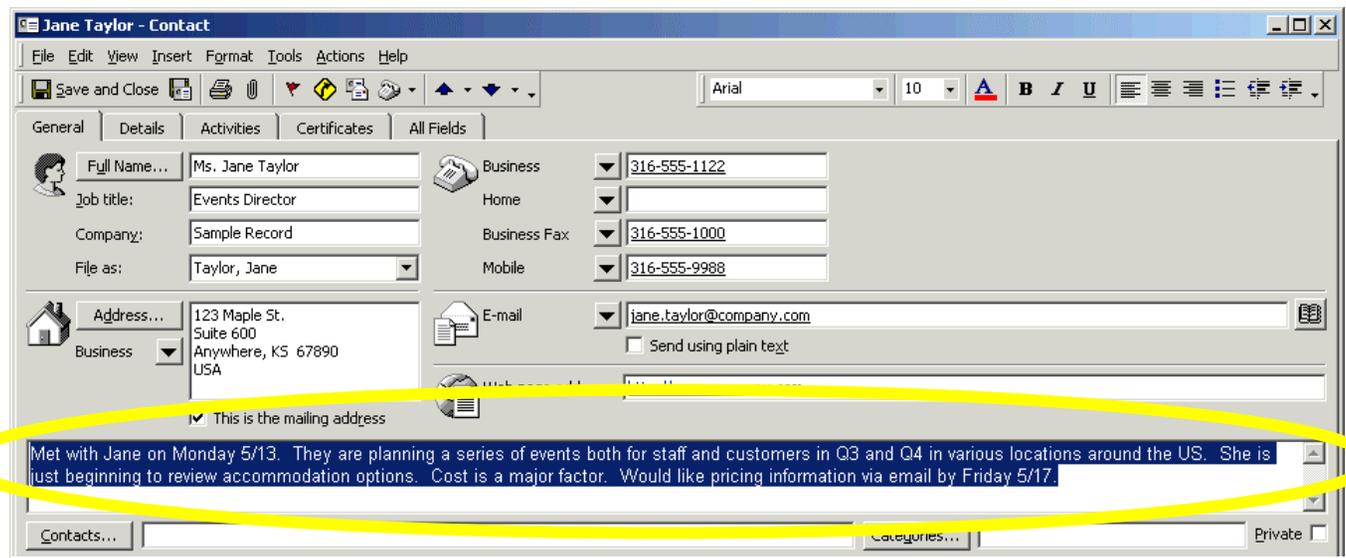


Figure 4: Add Comments to Microsoft Outlook Contact

Sales Update Record Status: ACTIVE

1 of 1

Contact Info

Name Ms. Jane Taylor	Call Center Rep Eric Barnes
Title Events Director	Region Dallas/Ft. Worth
Company Sample Record	DOS Elizabeth Branco
City Anywhere	Campaign None
State KS	Web Address www.company.com
Phone 316-555-1122	Email jane.taylor@company.com

GO

Contacts ADD

Contact	Title	Phone	Email	vCard
Jane Taylor	Events Director	316-555-1122	jane.taylor@company.com	
Frank Jones	Marketing Director	316-555-1234	frank.jones@company.com	

Custom Forms & Web Capture ADD

Date - Time	Form Name	Form Type	Status
4/15/2002	Candlewood Call Script	Supplemental	Modified
5/6/2002	Inspector General Call Script	Supplemental	New Entry

Sales Progress

Lead Status: Forecast Date:

Lead Value: \$0 Probability: 0%

Sales Reminder/Tickler

Call Back Date: Type:

Sales Rep Comments/Notes

Met with Jane on Monday 5/13. They are planning a series of events both for staff and customers in Q3 and Q4 in various locations around the US. She is just beginning to review accommodation options. Cost

5/16/2002 12:42 PM - Super Admin (Reassignment transaction)

GO

Lead Comments

DOS - Lead Feedback

Was an appointment made with this company due to this lead and your follow up? Yes No Not Necessary

Spell OFF

GO

Copy updates to LeadMaster: When you return to the office or are otherwise able to connect to the internet, go to the Sales Update screen for the record in question in LeadMaster. Click the Add Contact icon for the person in question and click Save and Close in order to trigger the Outlook Duplicate contact window. Be sure to press the **Open Existing Contact** button (see Figure 3). This will open the Outlook record that contains your updates. Copy the new comments you entered from the Outlook record and paste them into the Sales Rep Comments window in LeadMaster (see Figure 5) and then press **Go**. Remember to Cancel the duplicate contact alert window in Outlook. Alternately, you can go to Outlook directly and open the Outlook contact record then cut and paste the comments directly into the LeadMaster Sales Update screen and press **Go**.

Step 2: Paste text copied from Outlook Record in Sales Rep Comments Area

Step 3: Click Go to save new comments to LeadMaster record

Figure 5: Microsoft Outlook New Contact Window